DOCUMENT RESUME

ED 185 701 EA 012 654

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TITLE Report of the Annual Conference for Facilitators of Organization Development in Education (2nd, Eugene, Oregon, February 1-3, 1979).
INSTITUTION Oregon Univ., Eugene. Center for Educational Policy and Management.
PUB DATE Feb 79
NOTE 40p.: For a related document, see EA 012 655. Photos may not reproduce clearly.

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Conferences: Directories: *Organizational Development: School Districts

ABSTRACT

This paper includes presentations and discussions of the second annual conference for facilitators of organization development in education. Eighty persons attended the conference, held February 1-3, 1979, in Eugene, Oregon. Organization development is defined in this paper as a sustained effort at system self-study and improvement, focusing explicitly on change in formal and informal procedures, norms, or structures, using behavioral science concepts. The format of this report follows that of the conference, with summaries of panel presentations plus discussions of interest and application groups. A list of participants and their addresses and telephone numbers is included to help stimulate the networking and sharing that were goals of the conference. (Author)

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REPORT

OF THE

SECOND ANNUAL CONFERENCE

FOR

FACILITATORS OF ORGANIZATION DEVELOPMENT IN EDUCATION

Prepared by

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EA 012 654

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Preface

Here are the presentations and discussions of the Second Annual Conference for Facilitators of Organization Development in Education.

Eighty persons attended the conference, held February 1-3, 1979 at the Unitarian Church in Eugene.

The format of this report follows that of the conference, with summaries of panel presentations plus the discussions of interest groups, application groups, and back home groups. A list of participants and their addresses and telephone numbers is included to help stimulate the networking and sharing that were among the goals of the conference.

This report was prepared by Warren Bell and Spencer Wyant with the assistance of Patti DeWitz and Marc Zimmerman of CEPM. The photographs are by Phil Runkel. Dorothy Van Cleef of CEPM, in addition to her contributions to the organization and logistics of the conference, did her usual excellent job of final editing and typing.

The Steering Committee wanted this conference to be one of participation, relaxation, supportiveness, and connections among people doing OD in schools. We hope that this report captures the spirit and highlights of the conference for those who participated and provides a stimulus for people to reach out to one another during the coming year.

Conference Format

How do you organize a conference that successfully brings together 80 people with a common interest--OD in schools--and yet with such a wide variety of backgrounds, organizational affiliations, levels of experience, and kinds of expectations? The Steering Committee met several times during the fall and winter of 1978 to plan just such a conference. The committee was determined that this gathering should feature a variety of inputs, formats, and groupings, with a number of people sharing the spotlight. The conference should be open and flexible to modification in mid-conference based on feedback from participants. It should be informal, relaxed, supportive, and fun. The conference should go beyond itself--it should stimulate networking and contacts among participants during the coming year. It should be a conference of genuine sharing, interchange and networking.

The Steering Committee solicited ideas from many people who might attend--and made revisions during the conference itself--to produce the format shown here. Each half-day session began with a panel or lecture input dealing with some current critical issue in OD. Then small Interest Groups focused on particular barriers and strategies for using OD in various educational settings. Application Groups discussed ways of applying those inputs to different settings. Back Home Groups formed Saturday morning gave a sharper focus to applying inputs to participants' daily work.

Below are listed the names of the 1978 Steering Committee, who planned the conference reported here, as well as the new 1979 Steering Committee who will be responsible for the next conference. Any suggestions of ideas for next years' conference may be communicated to members of the 1979 Steering Committee.

The 1978 ("Old") Steering Committee

Jane Arends, CEPM, Eugene
Dick Howells, Freelance, Salem
John Lohman, Freelance, Lake Oswego
Dick Schmuck, CEPM, Eugene
Tom Thomas, Multnomah ESD, Portland

The 1979 ("New") Steering Committee

Nancy Bowman, School District 4J, Eugene
Dave Campbell, Northwest Regional Educational Laboratory, Portland
Janice Druian, Northwest Regional Educational Laboratory, Portland
Richard Francisco, Center for Educational Policy and Management, Eugene
Joy Gall, University of Oregon, Eugene
John Lohman, Freelance, Lake Oswego
Joseph Wiseman, Freelance, Eugene

Conference Schedule

Thursday Evening, February 1

Total community meeting for getting acquainted and formation of application groups

Friday Morning, February 2

Panel presentation: Readiness to participate in OD
Discussions by interest groups and application groups

Friday Afternoon, February 2

Panel presentation: Tackling difficult problems using OD
Discussions by interest groups and application groups

Saturday Morning, February 3

Speech by Dick Schmuck: Integrating OD with other school improvement efforts
Discussions by interest groups, application groups report and formation of back-home groups

Saturday Afternoon, February 3

Continued discussions by back home groups
Meeting of total community for back-home group reports and election of new Steering Committee

The remaining sections of this report follow the schedule of the conference. A list of participants appears at the end of the report.

Thursday Evening

Thursday evening was devoted to informing participants of the conference format and schedule, getting acquainted and forming application groups. While application groups were formed on Thursday evening, the content of their discussions and learnings is presented in the Saturday morning section of the report.

The second facilitators conference brought together 80 people with a wide range of experience and interest in OD. A sampling of responses to the Thursday night name tag question "Two things I want to get out of this conference" shows the diversity of interests and expectations that participants brought to the event.

Connecting with people

. . . have a good time talking with people from other places, job contacts with interesting people, friendships, new people, find people it would be fun to work with, renewing acquaintances. . . .

Developing the person and the professional

. . . personal and professional growth, support and affirmation, sense what skills I have and need to develop, explore possibilities of full-time OD consulting, learn what pains and rewards others are experiencing. . . .

What is this thing called OD

. . . more clarification of OD as it applies to me, reassure myself about OD--is it real? (and meet the reassurers), how does it fit into my educational and practical pursuits, how to OD. . . .

Give me some knowledge and skills

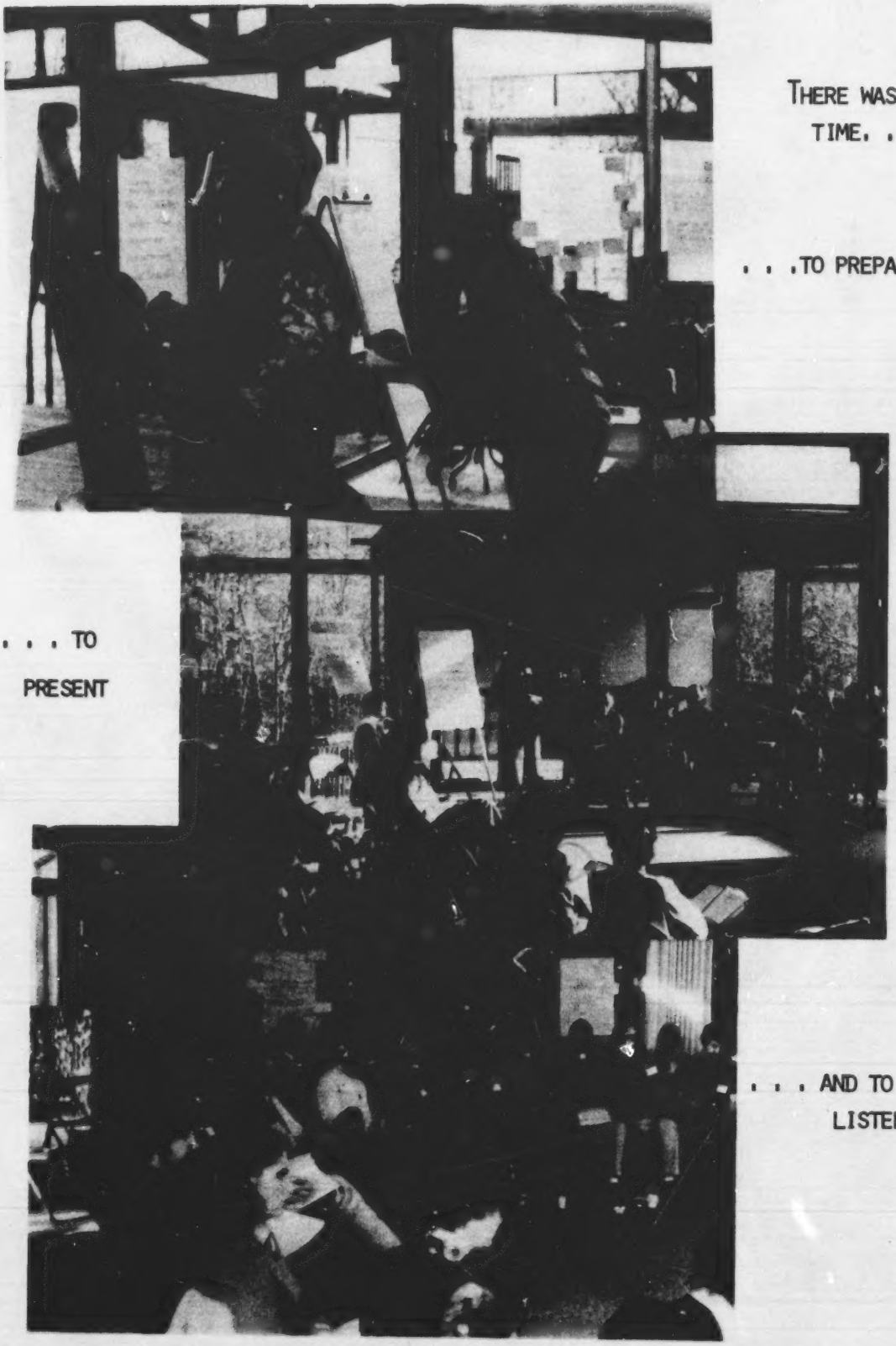
. . . sharing information with colleagues, facilitating skills, start-up ideas, sharing successful and unsuccessful experiences, more ways OD can work, how to facilitate change: getting 'em started and moving 'em along, skills for working with my peers and ways to relieve

my anxieties about working with my peers, who's who, where others are coming from, perceptions of how OD is impacting on educational change, ideas I can use back home, a few new ideas or concepts or skills or insights (I'll settle for two good ones). . . .

Address some specific issues

. . . how do other cadre members who are teachers find the OD responsibility in their district, meet people interested in nonconformity to traditional approaches in learning, new strategies for supporting teachers and administrators under conditions of stress, how to know when people are ready for new information and feedback, the role of temporary systems in OD, sharing ideas about change and the quality of life, building networks and keeping them alive, people and products and programs related to improving instruction, improving our project to build students and educators into collaborative problem-solving. . . .

Look at it this way. The conference participants would be a pretty good bunch of people to be stranded on a tropical island with. As John Lennon says "Imagine all the people. . . I'm not the only one" and many realized they weren't the only one during the conference.



THERE WAS TIME. . .

. . . TO PREPARE

. . . TO PRESENT

. . . AND TO LISTEN

TIME TO
DISCOVER . . .

. . . TO
SHARE

. . . AND TO
REACT

Friday Morning

Readiness to Profit from OD

Moderator: Ann Murphy, Lane County Education Service District
Panelists: Dick Arends, University of Oregon
Dave Campbell, Northwest Regional Educational Laboratory
Keats Garman, Northwest Regional Educational Laboratory
Martha Harris, Eugene School District 4J
Carolyn Hunter, Northwest Regional Educational Laboratory

The five panelists described a variety of barriers that prevent clients from effectively using OD as well as problem associated with efforts to induce change in organizations. Their presentations set the stage for interest groups to identify further barriers and strategies for dealing with them.

Dick Arends identified two knowledge gaps that act as barriers to readiness for OD. Some clients lack an appreciation of the intended outcomes of OD, while others lack knowledge of OD strategies and methods. If people have inadequate knowledge, the consultant can deal with that problem by explanation and teaching. If clients do not value the intended outcomes, however, modelling and sharing of values may be needed to ready the system for consultation.

Martha Harris discussed two kinds of overload experienced by clients. The first is due to too much to do--too much work with too little time and resources. The second is an overload of innovations and resources competing for time and money. This overload may be due to inadequate knowledge of how to use available resources. Symptoms of overload are apparent when key decision makers come to meetings late, leave early, and don't take the time to deal with vital issues and decisions thoroughly.

Keats Garman related an experience in which efforts were made to redistribute work loads and job requirements among a secretarial staff. The problems that emerged could not be solved until the group re-examined its overall goals as part of defining and negotiating new roles.

Carolyn Hunter raised the issue of rigid role compliance which hinders collaboration. She described three responses she frequently encounters when trying to alter people's roles. "That's not my job," "That is my job," or "It's not my job, but by the way. . . ." She suggested that re-examination and clarification of organizational goals must often precede role changes. Defining roles to include collaboration, and building

collaboration into the review process, are often needed to maintain a role change once negotiated.

Dave Campbell described four reasons for skepticism among the ranks. The massive amounts of innovation and reform begun in the last decade raised expectations but did not produce the change hoped for. Prophets and sales representatives promise too much too fast. Many innovations bring about superifical change while fundamental things stay basically the same. Groups of "old-timers" believe they've been around long enough to see all sorts of innovations come and go without producing much change. He suggested that these barriers might be overcome by identifying basic needs and dissatisfactions of clients and helping them deal with these issues.

Readiness Interest Groups

Participants formed interest groups according to types of client systems following the panel presentation. The groups' task was to identify the most common barriers to readiness in their client systems and strategies for dealing with those barriers.

Small, Simple Organized Groups (e.g., elementary faculties)

Barriers. Faculties have both active and passive obstructionists. Staffs can become polarized, as into "old guard" and "young turk" groups. Local communities can be non-supportive and instrusive when they hold negative attitudes. Small organizations often lack time and resources. District administrations may not provide the necessary support. There is misunderstanding and ignorance of OD. People do not recognize their own power to change and improve.

Strategies. Interview staff members to assess awareness and clarify expectations, bringing barriers and resistance out in the open. Legitimize the barriers and deal with them as problems. Build in a success early in the intervention. Design the intervention to focus on real problems faced by the staff. Work closely with the key administrator and a steering committee to plan the intervention.

Student Groups (e.g., classrooms, councils, interest groups)

Barriers. Students lack time: their rigid and heavy schedules leave little time available for OD-type activities. Many students won't

risk talking about real concerns in front of peers, while others don't recognize or verbalize their needs and hopes. Students often are very task-oriented and competitive, perceiving process issues as a waste of time. Students often are not ready or willing to take some responsibility for the way things are. They see themselves as powerless and don't know how to bring about change. They're not included in early stages of OD efforts and are unclear about the benefits and outcomes intended. As sex roles are formed, boys try to be "macho" while girls are non-assertive and passive.

Strategies. Use icebreakers, films, activities, and games to encourage participation and exchange among students. Use a variety of classroom structures such as small groups, pairs, trios, and fishbowls to enable students to work together. Role-play teacher-student behaviors with each taking the other's role. Model and teach communication skills. Create norms of support for openness, feedback, and attention to both task and emotional aspects of school.

Parent and Citizen Councils, Boards, and Committees

Barriers. Parents often lack skill, knowledge, and confidence. These kinds of groups may lack ownership or not be truly representative of their constituencies, while school systems are often not ready or organized to use influence from lay people. Some groups are mere tokens appointed by the system, while others are single-interest groups. School officials are commonly unresponsive. Since parents' interest is usually limited by their own children's involvement in a given school, turnover of membership is likely to be high. The consultant is then in a position of dealing with long-range problems but short-range help. Parents' long hisotry of negative experience with schools can dampen enthusiasm, or parents may not have a high sense of responsibility. A major barrier is the lack of an organized way of reaching people in the community.

Strategies. Teach parents skills in communication and negotiation as well as clarifying their responsibilities and limits of power. Build a climate of collaboration to help schools welcome the input of citizens' groups and educate organizations to see the benefits of working with community groups. Other possibilities include a full-time person to work on bridging the gap between system and community, and OD consultants who live in the community to help negotiate legitimate influence for representative community groups.

Associations and Networks that Cross Organizational Boundaries

Barriers. Consortiums or networks that are new or temporary face problems of ambiguity of identity or "turf," communication, and lack of clarity about goals and mission. Such groups often experience problems of status differences, lack of continuity, knowing who are the key people, and questions about decision-making. Generally, the consultant must deal with a lot of ambiguity about membership and mission.

Strategies. Build group agreements about roles and norms. Model a focus on issues rather than roles and status differences. Written statements of expectations clarify consultant-client relationships. Be aware of changing expectations of clients and the varieties of equity and autonomy found in such groups. Negotiations are almost always continuous and cyclic.

Large Organizations and Complex Systems

Barriers. Specialization, compartmentalization, and low interdependence can make it difficult to induce change. Established decision-making processes are often "top-down." The consultant must cope with fuzziness about what should be legitimated--the OD process? the outcomes? the consultant? all three? Staff may fear loss of power and status through change. Top management may sabotage efforts that seem to call on them to give up or share power. The consultant must face unrealistic expectations about how long change takes, time and energy restraints, and the need for maintaining change after the consultant departs.

Strategies. Focus interventions on top management, who have the greatest impact on the system. Become a quasi-member of the system: take the role of a teacher and growth facilitator. Help the staff set realistic goals and respond to the client's self-interest. Attend to developing commitment and motivation for change in management.

The Explorers. This group met with Dick Schmuck to discuss four types of OD intervention strategies: data feedback, training, process consultation, and confrontation.

Friday Afternoon

Tackling Difficult and Pervasive Problems in Education:

What OD has to Offer

Moderators: John Lohman, Freelance, Lake Oswego
Tom Thomas, Multnomah County Education Service District
Panelists: Al Dobbins, Curriculum Director, Portland
"Chic" Jung, Freelance, Lake Oswego
Mark Millemann, Freelance, Eugene
Pat Schmuck, SEEL Project Director, Eugene

The four panelists described major substantive issues facing educators, including collective bargaining, sex inequity, urban problems, and mainstreaming. Interest groups followed the panel with discussions of barriers and strategies.

Mark Millemann noted that OD methods are not being used in collective bargaining though they are badly needed; things will probably get worse before they get better. Win-lose attitudes on the part of boards and administrators as well as teachers will escalate, with unfortunate consequences. For example, people deal with each other as roles instead of people with values and feelings. The quantity and quality of communication between groups is reduced. Valuable energy is spent on posturing to gain a future negotiating advantage and on trying to outguess the other side's next move. High quality decisions are not reached by current trade-off techniques. Grievance procedures are the only mechanism commonly used to break management-labor impasses. Three OD strategies offering hope for improving collective bargaining processes are: (a) creating alternative structures of cross-role groups to improve communication channels, (b) upgrading bargainers' skills in collaborative decision-making, and (c) training in conflict management and integrative problem-solving.

Pat Schmuck, addressing the issue of sex equity, said that stereotypical views of males and females in society mean that sex is a status differentiator in our society. Sexism finds its way into work group interactions: women tend to play maintenance roles while men fulfill task functions. As a result, women are often ignored when they play task roles and men are ineffective at maintenance roles. Further, women typically exercise less power in large organizations because they are cut off from channels of communication and information. (Remember the

story of the female judge waiting outside the men's room to hear her colleagues' verdict!). Successful women are often isolated because men keep their distance and don't affiliate even though their competence may be respected. How to apply OD to sex inequity is unclear, though data feedback about sex role behaviors is sometimes enough to raise awareness and induce changes.

Al Dobbins focused on a variety of problems facing urban schools, such as racial desegregation and the quest for an integrated society, declining enrollments and "white flight," declining resources, the challenge of taxpayer (Proposition 13) revolts, the division of educators into labor and management, the increasing transfer of control from local to state and federal agencies, and the problems of massive size, bureaucratic inertia, and information overload. It is overwhelming just to keep people informed, and involving them in decisions is next to impossible! OD might be used to help people separate real from imaginary problems, and solvable ones from those completely outside their control. The key is that if OD is to have impact in urban schools it must address (somehow!) the pressing and crucial problems.

"Chic" Jung, sharing his experience with mainstreaming, reviewed some history of special education and asserted that OD has much to do with mainstreaming. A systems focus and organizational approach is essential if special education students are to be integrated with "regular" students. Effective mainstreaming requires training in interpersonal skills, conflict management, problem solving, and role negotiation.

John Lohman's summary of the panel emphasized the need to identify and legitimate individual differences and pluralism, to redistribute power, and to maintain the basic humanistic values of OD.

Difficult Problems Interest Groups

Fiscal and Collective Bargaining

Barriers. Most barriers are related to the issue of collaboration, especially when neither side wants to collaborate or both parties lack knowledge about the meaning of collaboration. Bargaining issues tend to escalate beyond their original dimensions, resources are drained when expensive negotiators are hired, and each party has difficulty recognizing the other's history, situation, and constraints. Negotiators rarely have alternative models to help them see their way out of win-lose dealings.

Strategies. Some strategies are basically preventive, such as training both sides, developing formal structures for communicating different points of view, and educating the public about the school program. Other possibilities include helping school personnel change norms to include expression of feelings by teaching constructive openness, clarification of role expectations, and developing OD skills of middle management. Research and development-based strategies include building comprehensive negotiation models and evaluating possible outcomes.

Sex Equity

Barriers. Sex inequity exists in many areas in schools: curriculum materials, staff role models, and a low level of staff awareness about sex equity issues, including equity for men and boys. Parental support is necessary to move toward more sex equity. There is need for more equal pay for equal work, equal performance criteria for men and women, and more women in school leadership roles. Barriers can be summarized by citing lack of awareness of the problem, present value systems, and resistance to removing sex role stereotyping.

Strategies. Several useful strategies depend on data feedback methods. The consultant can display data showing differences between boys' and girls' scores on math and reading tests. Observational data can show men performing task roles and women maintenance roles in groups. Data like these have more impact when collected and fed back by an inside person, not the outside consultant. Role playing and other exercises can help the staff experience other roles and learn new skills, such as task leadership in groups for women. Generally, increasing sex equity requires new awareness, knowledge, and application.

Urban Problems

Barriers. Urban problems are so complex and vast that it proved difficult to immediately focus on specific barriers. This group wrestled with specifying dimensions of urbanism and rural-urban differences. Urbanism came to be defined as a wide range of lifestyles, socio-economic status, and bureaucracies. Particularly urban issues for the consultant include density, pluralism, size, complexity, diversity, and anonymity. The consultant faces urban issues such as bussing and mobility, institutional racism, loss of local control, and major issues of control, influence, and power. If that weren't enough, the consultant needs to face problems of declining enrollment, using data to predict future trends, and making OD work at the school-community interface.

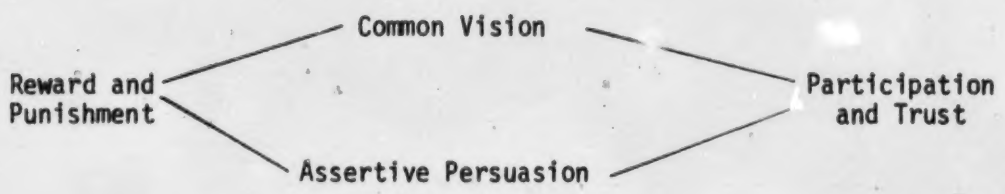
Strategies. Obtain data from many groups to identify common problems and goals to build for a common success. Find ways to fit OD and innovation into existing contractual agreements. Work to combine teaching and volunteers at the local school level.

Mainstreaming

Barriers. Teachers are just now learning to work with children with special needs, and many teachers feel that one such child takes too much time, at the expense of other students. Help is also needed with students who are potential dropouts. Consultants face a role conflict between being advocates and process persons. Several group members related situations in which they attempted to play both roles, with mixed results.

Strategies. Keep content and process roles clear, both to the client and to yourself. Schools can use both content and process resource persons. Teachers can be brought together to brainstorm problems related to mainstreaming and strategies for dealing with them. The consultant must help the school staff use its own resources to deal effectively with mainstreaming.

The Explorers. Phil Runkel led a discussion of basic issues in OD, using Roger Harrison's model of power and influence, as shown here.



Saturday Morning

OD in Schools: Where We've Been And What We Have To Do

Jane Arends convened the total community, reviewing Friday's events, and describing the orientation of Saturday's agenda. She then introduced Dick Schmuck. His talk recounted some history of OD in schools and presented participants with several challenges to using OD with school systems. Here is a somewhat edited version of his speech.

Dick Schmuck

Organization development, as defined by Matt Miles and Michael Fullan, is this:

> Organization Development is a sustained effort at system self-study and improvement, focusing explicitly on change in formal and informal procedures, norms, or structures, using behavioral science concepts. The goals of OD include the quality of life of individuals as well as improving organizational functioning and performance.

The history of OD in schools can be viewed in terms of Paul Mort's theory about the diffusion of educational innovations. Mort suggested that there is a long, gradual start-up period, during which relatively few districts adopt a given innovation, followed by a very rapid increase as many districts adopt it in short order. OD in schools is now somewhere in the gradual start-up period.

A signal event for OD in schools was the 1959 publication of Miles' book Learning to Work in Groups. That publication was followed by the efforts of a cluster of people at Michigan in the early sixties, among

them John Lohman, "Chic" Jung, and Dick Schmuck. Miles conducted a major OD project in 1964, the COPED project was begun, and the "Strategies of Organizational Change" program was founded at CASEA in 1967.

Even though OD appears to be in the "gradual start-up" phase, several signs offer encouragement for the future. The by-now famous RAND report strongly supports the use of OD-type efforts for school improvement. Federal and state agencies are giving support to local development. Funding agencies are putting out requests for proposals that can support OD efforts. Recent California legislation (AB 65) carries a mandate for parents, educators, and students to work together on local school improvement. Cadres have recently grown in New York, Florida, California, Colorado, and Oregon. The role of the school counselor seems to be shifting toward one of a consultant for teachers. Finally, the world-wide concern for the quality of work life fosters a supportive zeitgeist for OD in schools.

Against these encouraging signs, however, there are a myriad of obstacles--many of them issues raised in this conference--which have to do with readiness and societal problems. We must face these obstacles realistically, but not let them deter us from acting tomorrow, next week, and next year.

The major obstacles to the diffusion of OD in schools lie within ourselves. We can have an impact on schools, but to do so we have to avoid making these major mistakes:

- Seeing problems in terms of personalities insted of basic organizational and systems factors
- Contributing to the burn-out, tiredness, and exhaustion that educators now experience
- Being seen as forcing or causing change rather than as persons who help individuals and organization cope with change
- Dogmatically advocating a position or cause--we should advocate student rights, mental health, and growth, and not become identified with a single cause.

The consultant has to avoid being identified as a tool of management. We work to assist management as well as teachers, students, and parents. Further, consultants cannot afford to be labelled as soft, process-oriented folks who shy away from the hard issues of conflict, confrontation, and negotiations.

As OD consultants, we have some strongly held values:

- People are capable human beings
- Love and power are expanding forces
- Patience and understanding overcome

We need to hold on to those values, and not lose sight of our sense of culture and ideology. The strength of OD as a means for school improvement, and our own ability as consultants to help improve the quality of work life, rests on these values . . . helping to give people choices, participation, and involvement in running their own lives, and gaining the capacity to solve their own problems.

Integrating OD with Other School Improvement Efforts

New interest groups formed on Saturday morning after Dick's speech to look at ways in which OD consultants can collaborate with other persons in areas such as inservice, curriculum development, community organizers, evaluators, and the like. The interest groups focused on barriers to collaboration, some facilitating and constraining forces, and strategies for overcoming the barriers.

Staff Development and Inservice Specialists

Barriers. Perhaps the major obstacles to collaboration are the perceived competition for time, facilities, and turf, as well as the expectation that big-name outside experts are needed to deal with big problems. That attitude, coupled with a lack of confidence in existing resources, drains the school's resources and passes responsibility off on others. Other barriers include role ambiguity, a perceived lack of credibility, inservice that is imposed or mandated, job insecurity, inertia and overload on teachers, lack of agreement about needs and solutions, and the unwillingness of clients to admit the existence of problems.

Strategies. Carefully define the process and outcomes of a consultation, stating clearly what the client is going to get. Establish your credibility by specifying what you do know, as well as what you don't know ("I can help you with A, B, and C . . . but I'm not ready to handle X, Y, and Z"). Clarify learning models with other change agents, demonstrating how you can both gain from collaboration.

Curriculum Developers and Specialists

Barriers. These folks typically have an orientation and emphasis quite different from the OD consultant: the what of school programs in contrast to OD's focus on the how of doing things.

Strategies. One promising approach is to have the OD consultant follow some mandated or imposed change and work with people who must comply with it. Even in dealing with curriculum change, the consultant needs to maintain a system perspective. Internal cadres who can help school people adjust to changes and improve their problem-solving capacity are another approach.

Community Organizers and Leaders

Barriers. Client groups such as PTA, neighborhood associations, advisory councils, elected community groups, watchdog groups like taxpayers' associations, community clubs, and ad hoc groups focused on single issues present special problems to the OD consultant. Among them are devisive interests, little collaboration between groups, unwillingness to participate, transitory membership, lack of skills and awareness of issues, and tokenism. Organizations are often unwilling to work with these groups. Community groups often are jealous about guarding their own territory or have a strongly-loaded emotional basis (e.g., anger) for organizing.

Facilitating forces. There are now increased fiscal and human resources available, an increased interest in school operations, and a growing sense of neighborhood. Tax reform efforts such as Proposition 13 have created new and strong alliances. The community school movement has helped unite, involve, and legitimize community group participation in school issues. The involvement of parents has helped child growth as well as increased community awareness and participation.

Strategies. Re-examine basic societal and educational goals and objectives. Build teams that cross organizational levels and boundaries. Hold conferences to share ideas, values, and knowledge. Conduct workshops to increase awareness and participation. Build networks for increasing awareness of commonalities. Establish an open door policy to invite parents into schools, classrooms, and decision-making. Teachers can visit parents in the community. Find settings outside of school where parents and educators can interact. Block Parent programs are yet another means to increase involvement. Effective needs assessments help build relationships, trust, and open communication. Consultants and community organizers need to work with media, help develop leadership skills, and solicit grass roots involvement.

Evaluators, Auditors, and Compliance Monitors

Facilitating forces. Many functions of the evaluator complement OD efforts. Evaluation data can confront people with the recognition of interdependence and can help forecast consequences of action (or inaction). Evaluators often have access to local districts and state systems, legitimate authority, and financial resources. Evaluators often are skilled data collectors, with access to inside information, who are looking for help. Many have the political savvy needed to understand and work with systems.

Constraining forces. OD consultants and evaluation folks often hold incompatible images of each other. Evaluators are seen as cold, calculating, and rational, unwelcome when perceived as monitors, or stereotyped only as auditors. People tend not to like being evaluated, monitored, or audited. Functional barriers exist, such as finding compatible working times and being located in different parts of the organization. At times, evaluators and consultants are seen as belonging to entirely different cultures. Evaluators sometimes see OD activities as "not evaluation" and consultants as not recognizing their work and accomplishments.

Strategies. Consultants can work on the evaluators' "turf" with an inter-disciplinary team or collaboratively train a third party--such as a curriculum specialist--to work in schools. Combine evaluation with data feedback techniques. Develop innovative variables (e.g., climate, attitudes, expectations) and associate them in new ways, as by looking at achievement scores, sex and race differences, and so on. The consultant can influence the kinds of information collected, methods for obtaining it, and ways in which the data are used.

Administrative Teams

Barriers. Perceptions of the barriers vary with positions: consultants see the world differently from administrators. Sometimes administrators' perceptions of what OD is and how it will affect them represent an obstacle. The chief administrator may feel that she or he will lose power as a result of the intervention, that they do not have the time and resources needed to pull it off, or that the promised benefits are unclear. Resistance takes many forms. Some administrators react negatively to "training," while others unhappily find that the change process takes more time than anticipated, and still others aren't sure what will happen as a result of the intevention. Administrators and former administrators in the group saw other barriers. Building principals don't receive clear performance objectives from the superintendent and feel caught in a bind. Consultants are often unclear about their objectives. Feeling overloaded already, administrators think that little time and few resources are available to commit to a change effort.

Strategies. Establish a good working relationship with the administrator. Allow the manager input into the change process. Provide him or her with concrete examples of how OD can help. Start "where the folks are" and deal with their felt needs. Make goal-setting a dialogue between consultant and administrator. Enable the client to experience a small success early, giving them something to build on. Emphasize the system's needs and resources, not those of the individual. Make a special effort to help consultant and administrator understand each other's world-view.

Technical Assistance Specialists

Critical factors include determining who is the client, building trust with the client, and understanding the system at entry.

Barriers. When world-views collide . . . Technical assistance folks generally are content-oriented, in contrast to the OD consultant's emphasis on process. These differences present potential conflicts in perspectives on the organization and its needs, styles of working with clients, and intended outcomes of change efforts. Some technical assistance people do not value processes such as problem-solving (and, to tell the truth, a lot of OD types don't put a high priority on content issues).

Strategies. Understand the values, norms, power structure, and specific setting of the system and your collaborators. Build a solid contract upon entry and continually re-examine the contract. Work with the technical specialist to build norms of trust and openness among the collaborators and the client. Modelling and helping the client take responsibility for the change can help build that trust and facilitate the change process. Be flexible! There are many paths to the same door! Be clear about what you can and can't influence in the system.

Loosely-Coupled Client Groups

Barriers. Teachers and students often feel isolation from the peers, a sense of anonymity or cynicism, and powerlessness. They feel they have little time and energy to expend in change efforts. Their initial motivation for change may be minimal. Societal norms such as sexism or the prevalent "military model" of organizational structure are obstacles. Lacking knowledge about OD, the group's expectation that "the consultant will give us the answer" can get in the way of building an effective working relationship.

Strategies. Encourage collaboration, role clarity, and delegation of authority in the system. Bring people together to solve problems and establish common goals. Some specific strategies can help the consultant work with classroom groups. OD can emphasize working with classrooms as well as management. Team-building among teachers can promote change from the bottom up. School counselors can act as consultants to teachers and classrooms. The consultant can enter the classroom through the curriculum subsystem, using curriculum content as an impetus for shared decision-making between students and teachers as well as classroom problem-solving.

Personnel Services

How can the school counselor take on the role of a consultant within the school? What factors affect the counselor's ability to help meet student needs? What determines the effectiveness of a counselor-initiated program aimed at helping students and teachers meet their needs? This group of counselors expressed the desire to be perceived as facilitators who help students and adults in schools use their own resources. One key factor is the principal's acceptance of the counselor-as-facilitator role. It is also important that students, staff, and administration view the counselor as a resource.

Strategies. Set up a meeting of a group of teachers and mental health workers. With the counselor as facilitator, such a group could focus on student needs and ways of meeting them. This strategy offers one way of initiating programs for students. Provide data to support the program. Help staff and students in problem-solving to identify the varied needs of students and innovative ways to meet them.

The Explorers. Meeting with John Lohman and Dick Howells, the explorers looked at overall goals of OD strategies--the improvement of problem-solving skills. The group discussed strategies for assisting others to diagnose their needs, set goals, prescribe improvements, and assess results. The group also dealt with OD's dual focus on system characteristics as well as individual satisfaction and productivity.

Saturday Morning

Application Groups

One way of processing inputs throughout the conference was to be the application groups of six to ten people formed Thursday night. Scheduled to meet four times during the conference, the application groups were to apply the content of total community presentations to back-home conditions and interests. On Saturday morning, each application group was given the task of reporting its key learnings and discussions to the total community. Seven interest groups reported on Saturday morning:

Entrepreneurs. The largest of the application groups, with 15 to 20 members at various times, came together around the common interest of private free-lance consulting. Few in the group were full-time free-lancers but almost all had some experience with private consultation. Discussions centered on three key questions: "How do you make initial contact with clients, contract for services, and conduct on-going negotiations with clients?", "How do you sell yourself as an independent consultant?", and "How do you build a base of clients?" Some suggested offering free workshops as a forum for contacting potential clients. Others offered the idea of a clearinghouse or brokerage firm for OD consultants. The advantages of a network of clients were considered. One major learning from the entrepreneurs' group was the realization that application groups should be small--no more than six to eight persons--and have a tighter focus of interest.

Linkers. Members of this small group met on and off during the three days to wrestle with the questions of how OD could be applied to "linking" and vice versa. Often they struggled with issues of what OD is and what linkage is and how the two fit together. Being practical sorts, they decided that the best way to relate OD and linkage was to do linking. One member moved around the room, shaking hands and greeting folks, thus "linking" people together.

Compleat Kadray. Notable more for spirit than spelling, this lively and productive group included persons interested in the role of the internal OD cadre member. Visibly enjoying working together, this group's members also produced some valuable insights on applying OD. They noted that "the problem" is not teachers, administrators, or parents, but how these different role groups interact and relate with each other. They generated practical ideas for using OD with complex urban issues. They came away with a new appreciation of the way OD helps people "wear each other's shoes," to see and feel a problem from another's perspective. OD, the group decided, isn't simply an abstract theory, strategy, or project, but it represents a "way of living together."

Cadre Crocodiles. (Well, that's one way to deal with the problem of alligators and draining the swamp!) Some major learning emerged from the "Croc's" spirited discussions of using OD strategies in school districts. For example, you need to do your homework and know what conditions your client is living under. Diagnosis is vitally important, even though there's never enough time for it. A difficult task is enabling a client group to value its own resources, identify what its members don't have, and reach out for those additional skills. A difficult issue is interdependence, increasing it within groups and among subsystems, and the need to build common goals and visions. The "Crocs" highlighted the importance of the practitioner providing a good model for clients. The name "Cadre Crocodiles," by the way, was chosen to portray the quiet patience one must have as an OD practitioner, as described in Phil Runkel's lively rendition of Lewis Carroll:

> How cheerfully he seems to grin,
> How neatly spreads his claws,
> And welcomes little fishes in,
> With gently smiling jaws.

Policy Boards and Advisory Councils. The four members of this group came together because of their interest in working with community policy and advisory boards. Their discussion moved between broad topics such as sex equity and specific issues such as strategies for working with school boards. Two issues frequently raised were client ownership of change and maintaining change in policy and advisory boards. One member related his experiences in establishing a critical planning group charged with the responsibility for improving the functioning of a school board and maintaining that change after the consultant departs. Several important learnings emerged, among them the need to work within the client system and learn its language. Simply "hanging around" can provide a lot of learning about the client's history, feelings, and ways of working together. The consultant must help the board use its own resources for change. Giving board members increased skills helps them handle the impact of change when the consultant leaves so that they can continue to develop better ways of working together. Finally, the group re-learned some negative consequences of using the language of OD, and the importance of being clear about when and why we use it with ourselves and clients.

Power and Ownership. Sharing an interest in research and development, members of this group discussed issues such as achieving parity of power in organizations, strategies for increasing the total amount of power available in organizations, and a realization of consultants' own power. Another major topic for the group was that of the differences and interfaces between OD and advocacy. The group's suggestions for consultants included working where the positive energy is, getting the larger picture

in perspective, using training when appropriate, using language appropriate to the setting, getting to problems quickly, re-thinking issues of entry, and--above all--being flexible.

The Explorers. As the application groups held their first meeting Thursday night, several people found themselves lost, feeling a need for more basic information on the concepts and strategies of OD. They banded together to explore these issues, meeting at different times with Dick Schmuck, Phil Runkel, John Lohman, and Dick Howells. These discussions hit several major topics, including the language, concepts, and skills of OD; methods of using OD; an appreciation for the field's values and goals; an awareness of their own skills and potential for more growth and study; and a realization of how difficult it is to explain OD in 25 words or less!

THERE WAS TIME TO INTERACT

. . . AND LISTEN

. . . AND REFLECT

A TIME
TO LAUGH . . .

A TIME
TO HEAR

. . . AND A
TIME
TO TALK

30

Back Home Planning Groups

Late Saturday morning, the conference planners encouraged participants to form back home planning groups, joining with those they worked with in their normal settings. Individuals who did not come in teams were encouraged to find others with similar interests, positions, or plights.

Back home groups had the task of discussing the implications of their collective learning for their normal work setting, and to list any wants or contributions they wished to communicate to the total community. Here are the groups, their members, and their communications.

Free-lance Consultants

(Russell Barton, Jean Butman, Trudy Fisk, Dick Howells, Pat Jordan, Kay McCarthy, Mark Millemann, Sakre Oller, Roberta Richards, Lorinda Rowledge, Laura Stine, and Joe Wiseman)

One of the largest conference groups, the free-lancers (and those wanting to become free-lancers) stated their wants as jobs, support, friends, organizational affiliation, job-sharing opportunities, ideas, national recognition, and fame and fortune! They listed their contributions as themselves, their numbers, skills, credentials, and experiences in linking process consultation with program evaluation.

San Mateo County Cadre

(Dick Coste, Grace Eggert, Rich Gemmet, and Ed Muehlhausen)

This new and growing group of practitioners wants a loose connection with other cadres, ongoing affiliation and communication with other practitioners of OD in education, and an exchange between cadres of brief descriptions of successful interventions, experiences, and programs.

Cupertino Cadre

(Beth Beggs, Kathy Lindsay, and Shareen Young)

As another new group of internal organizational specialists, this cadre expressed wants for continued links with other cadres in their

region, information about long-term intervention designs used by other cadres, and assistance with starting a professional library. Their contributions include their willingness to put their enthusiasm and energy into the diffusion of OD.

Salem Contingent

(Greg Hansen, Wilbur Jackson, and Florance O'Neal)

Expressing wants for establishing a support group in the Salem area, the trio shared their contributions of enthusiasm for OD and the suggestion that an OD course be offered in Salem via a university extension class.

Eugene Cadre and Friends

(Nancy Bowman, Ann Burr, Mary Frances Callan, Mary Lou Feuerbach, Joy Gall, Pat Jordan, Barbara Keirnes, Jeff Kurtz, Larry Littoff, Evie Matthews, Roy Ronaghan, and Carol Villa-Louvez)

The large home town group (plus friends from the Big Apple and British Columbia) reported wants for continuing annual conferences--augmented by other forms of communication such as an informal newsletter, a regional telephone conference to exchange progress reports--and for more advanced training. They stand ready to make contributions of sharing their techniques and knowledge with others.

Northwest Reading Consortium

(Warren Beecroft, Dave Campbell, Jim Gorman, Al Haugerud, Ann Murphy, and Leanne Rokovitz)

Representing a four-state knowledge utilization project, this group expressed wants for a new source of funding, continued support, and contact with friends and others working to improve educational practice. Their contributions include sharing of their learnings about content and process interventions in schools, and their knowledge of working with multi-agency configurations for school improvement.

Loyola Marymount University

(Joan Conley, Marrae Martin, Luis Ramirez, and Tom Wilson)

This Los Angeles-based groups wants a link with any institution of higher learning with an internal cadre, linkage with consultants who have experience with Title IX, Affirmative Action, cadre building, and the use of OD in Catholic bureaucracies. They made contributions of a model that relates the theory and practice of social justice and OD to a systematic, holistic intervention for change that focuses on student affairs in higher education. The group also (bless them!) made a contribution of holy water and absolution following the post-conference party!

Temporary Groups

(Janice Druian, Darrel Duncan, Keats Garman, and Carolyn Hunter)

Identifying themselves as members of temporary groups working with permanent organizations in education, this group noted wants for more information about how temporary groups can be intergrated with permanent groups to get something done.

Strategies of Organizational Change

(Jane Arends, Camilla Bayliss, Patti DeWitz, Richard Francisco, Evie Matthews, Scott Pengelly, Phil Runkel, Dick Schmuck, and Marc Zimmerman)

SOC's contributions included (whether you want it or not!) the story of the bear making a tree. The group expressed wants for information or documentation of projects, schools, or people using OD, especially if the effort focused on students' participation in the OD project.

Saturday Afternoon

The Total Community Says Farewell

Back home planning groups reported their wants and contributions to a meeting of the total community on Saturday afternoon. Participants also named six persons to the 1979 Steering Committee. The final activity was a debriefing and written evaluation of the conference.

Saturday Night

Ah, Saturday Night!

Pat and Dick Schmuck hosted a party for conference participants at their home. As the evening progressed, some folks continued discussions and making linkages with their colleagues, while others got down to boogie up a storm. A good time was had by all.

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